

# Town of Fairfield

## Strategic Plan Committee

**Strategic Plan Initiative Status & Update to Board of Finance**  
**June 4, 2019**



## **The following slides provide an update on:**

- Strategic Plan development status
- Community Outreach results
- Next steps in finalizing a Strategic Plan

# Strategic Planning Activities

## Where We Are in the Process

### Structure Analysis

- Gather Information
  - ✓ Document review
  - ✓ Reconnaissance
- Brainstorming Templates
- Strategic Issues
- SWOT
- Etc.



### Gather Stakeholder Input

#### Interviews & Workshops



- Dept Heads
- Elected Officials
- Boards & Commissions
- Other Stakeholders
  - Business
  - Developers
  - Universities
  - Etc.

### Gather Constituent Input

#### Community & Business Workshops



#### Do It Yourself Workshops



#### Additional Approaches:

- Community Input form
- Web Questionnaire



### Evaluate benefits and implications



Options



Tradeoffs

SPC / Other Feedback



- Input and ideas will be gathered from multiple sources
- The RTM has agreed to provide a Liaison for each RTM district

Completed



Completed



Completed &  
Being Socialized



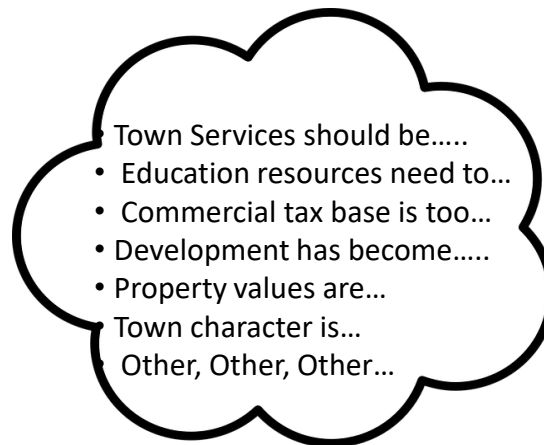
# Strategic Plan Committee

## Robust Community Feedback Has Been Gathered & Summarized

### Data Gathering

Approach
Research & Analysis
Stakeholder Framing Interviews
Community, Business & DIY Workshops
Questionnaires and other input

### Viewpoints



### Results

#### Community Outreach Report



- Executive Summary (2 pages)
- Details (10 pages)

# Strategic Plan Update

## Summary of Participation/Feedback (Final)

### Feedback Has Been Gathered From All Segments of Town

#### **SUMMARY STATUS:**

- Direct Input = 2000+ people

#### **HLA COMPLETED WORKSHOPS**

- Stakeholder Interviews - (70)
- SPC Workshop - HLA (11)
- FWHS (40); FLHS (40)
- FU (20); SHU (20)
- CW#1 - (40)
- CW#2 - (24)
- BW - (13)
- Joint Board/Commission (9)

#### **HLA WEBSITE SURVEY**

- Resident: 979+
- Business: 25+
- Youth: 27
- University: 3
- map.social: 18 features, 2 maps

#### **POST CARDS & SPC WEBSITE**

- Submission / suggestions from red Post cards (13)
- Submission / suggestions from SPC web site (6)

#### **SPC COMPLETED DIYS:**

- Jennings 5th grade - (17); Woods(25)
- Jacobsen, youth group - (4)
- Bigelow Senior Center - (17)
- Fairfield Senior Advocates (15)
- FBRA (16)
- Stratfield Village Association (10)
- RNoren Neighborhood group (15)
- Woods PTA - (12)
- Osborn PTA - (29)
- North Stratfield PTA (12)
- Holland Hill PTA (17)
- Stratfield PTA (15)
- Riverfield PTA (12)
- Burr PTA (14)
- SE PTA (7)
- Dwight PTA (17)
- Jennings PTA (20)
- Sherman PTA (5)
- McKinley PTA (10)
- Southport Congregational Church - (17)
- B'nai Israel (6)
- Blackrock Church –Adults (21)
- Blackrock Church – Youth (23)
- RTM D#s 2,3,4 (9)
- RTM D#s 8 & 10 (14)
- Update to State delegation (4)
- SPC completed Interviews (3)

# Strategic Plan Update

## Key Areas From the Community Outreach Results

Topic	Key Components
<b>Governance</b>	<ul style="list-style-type: none"> <li>• Town wide Goals and Branding</li> <li>• Reexamine the Town Charter</li> <li>• Streamline and improved efficiency of Town services</li> <li>• Shared services and multi-community cooperation</li> <li>• Upgrade and integrate technology</li> <li>• Better leverage “a unified” State representation</li> </ul>
<b>Financial Stability</b>	<ul style="list-style-type: none"> <li>• Improve non-residential financial contribution -</li> <li>• Spending and economic trend impact on property values</li> <li>• Control of labor related costs</li> </ul>
<b>Economic Development</b>	<ul style="list-style-type: none"> <li>• Expand the Office of Community and Economic Development</li> <li>• Identify sites for new commercial development</li> <li>• Eliminate barriers to development, including a “re-imagining” role of Zoning</li> <li>• Proactively address local Landmark blight</li> </ul>
<b>Education</b>	<ul style="list-style-type: none"> <li>• Quality of Education</li> <li>• Quality of school facilities</li> <li>• Declining school attendance and rising costs</li> <li>• Lack of diversity throughout the district</li> <li>• Opportunities for greater partnerships with Town Universities</li> </ul>
<b>Community Character and Resiliency</b>	<ul style="list-style-type: none"> <li>• Zoning Design</li> <li>• Enhance aspects of the transportation options</li> <li>• Resiliency and sustainability</li> <li>• Senior programs, affordability, facilities, and initiatives to integrate and support them</li> <li>• Unify the community</li> <li>• Maintain and enrich support networks of various kinds</li> </ul>

# Strategic Plan Committee

## The Path to Finalizing the Strategy

### Strategic Insights & SWOT Analysis



### Community Feedback



### Next Steps

Potential Strategic Options



Subject Matter Expert (SME) Input & Analysis



Community Feedback (approach TBD)

SME Participation to leverage Stakeholder interview participants

Refinement & Evaluation

### Strategies, Refinement, Reviews



### Finalize Report



# Strategic Plan Update

## Subject Matter Expert Panel (Draft 5-9-2019)

Topic	Key Components	SME Candidates
<b>Governance</b>	<ul style="list-style-type: none"> <li>• Town wide Goals and Branding</li> <li>• Reexamine the Town Charter</li> <li>• Streamline and improved efficiency of Town services</li> <li>• Shared services and multi-community cooperation</li> <li>• Upgrade and integrate technology</li> <li>• Better leverage “a unified” State representation</li> </ul>	
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**The following slides were utilized during the community workshops to provide background on the Strategic Plan initiative.**

# Strategic Plan Update

## Objectives

### **Objective:**

- Provide a status update and identify key points documented in the Community Outreach results.
- Describe next steps in the Strategic Plan process.
- Provide background on the Strategic Plan initiative.

# Strategic Plan Committee

## Background

- The Town determined it would be beneficial to develop a strategic plan and has established a Strategic Plan Committee (SPC) and committed resources to develop such a plan.
- Such a plan helps to evaluate certain key questions:
  - What is the current status of the Town and how did we get here?
  - What would maintain and improve the desirability of the Town?
  - What actions are needed to help that be achieved?
- The process to develop the plan will involve widespread community input, perspectives from elected and appointed officials, businesses, Town employees, residents, and other community groups.
- This material has been prepared to provide a snapshot of current status.
- Appendices provide supplemental information on the consulting provider, detailed activities, SPC Committee Charge, SPC members, etc.

# Strategic Plan Committee

## Strategic Plan – What is it?

- A "Strategic Plan" is the highest level plan or roadmap an organization uses to plan its course and direction. Other operating plans feed into the overarching objective of the Strategic Plan.
- Town has an annual budget and a Plan of Conservation and Development (POCD) and many other topic-specific, or operational plans.
- The Strategic Plan will have a longer term time horizon, looking out past the next 3-5 years on how to maintain or improve the Town's ability to thrive.
- Strategic Plans for other communities have focused on areas such as: commercial development, economic development, Education, Governance, Financial/tax management, Town character, spending control, etc.
- Fairfield's focus areas will be determined from project analysis, activities and community input.

# Strategic Plan Committee

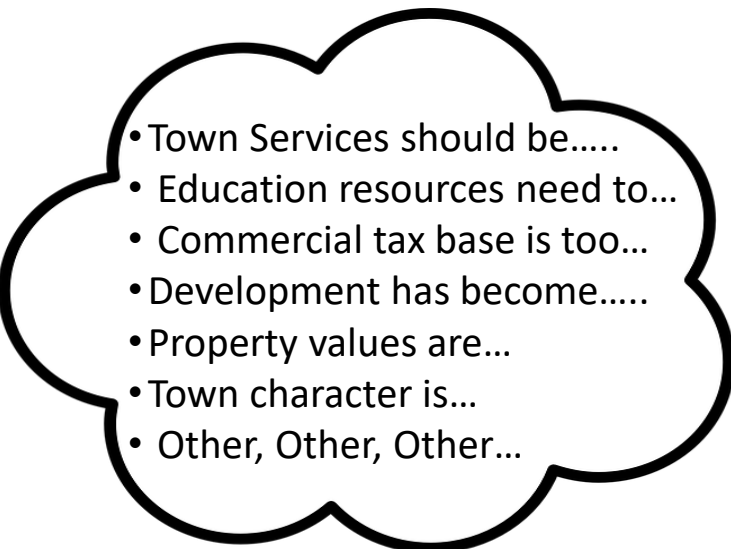
## Strategic Plan – Why is it Needed?

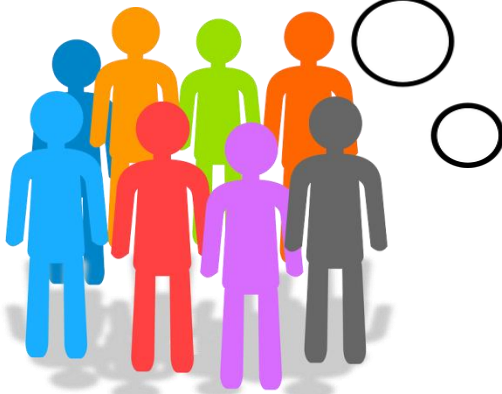
- Economic and fiscal issues here in CT have changed and are impacting the Town in negative ways. State support of key assets have been allowed to erode (e.g. State financial support to Town, Roads, Rails, etc.). This situation presents our town with both opportunities and challenges which need to be evaluated.
- Societal issues (e.g. technologies, worker mobility, demographics, style of living, etc.) have changed, and could present the Town with opportunities we may miss otherwise, or be considered differently in planning decisions.
- Many factors are impacting the overall competitiveness of our Town as we “compete” with neighboring communities in many ways (residents, developers, businesses, workers, etc.).
- Clear, consistent objectives and plans can help to define and respond to needed actions.

# Strategic Plan Committee

## What is the Path?

### Viewpoints

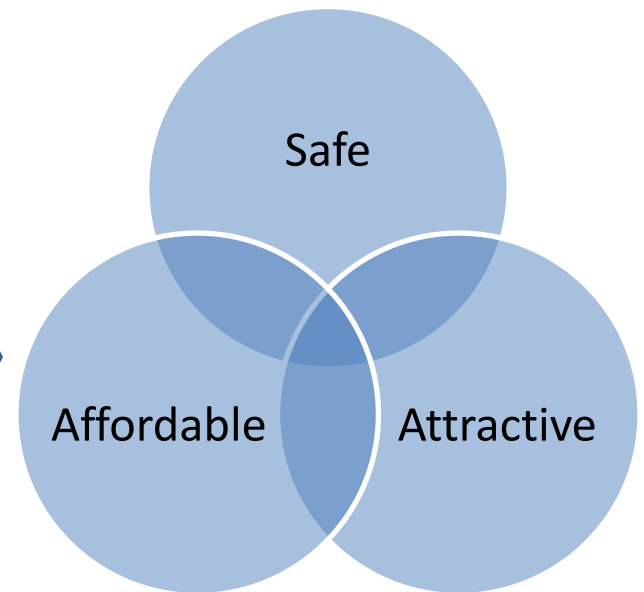
- 
- Town Services should be.....
  - Education resources need to...
  - Commercial tax base is too...
  - Development has become.....
  - Property values are...
  - Town character is...
  - Other, Other, Other...



### Analysis

- 
- Objectivity
  - Current situation
  - Analysis
  - Community Input
  - New ideas
  - Options / Tradeoffs

### Objective



# Strategic Plan Update

## A Perspective on Traits of Desirable Communities

Trait	Illustrative Considerations
<b>Safe</b>	<ul style="list-style-type: none"> <li>• Police, Fire, Medical – prevention and response</li> <li>• Emergency preparedness</li> <li>• Communication planning</li> <li>• Other, other, etc.</li> </ul>
<b>Attractive</b>	<ul style="list-style-type: none"> <li>• Town Character, Style, “feel”, etc.</li> <li>• Education resources and commitment</li> <li>• Vibrant and diverse across all aspects</li> <li>• Physical beauty here / access to other recreational areas</li> <li>• Culture, Arts, Dining, Entertainment</li> <li>• Recreation &amp; Leisure</li> <li>• Other, other, etc.</li> </ul>
<b>Affordable</b>	<ul style="list-style-type: none"> <li>• Town Services (type, service level, fees, etc.)</li> <li>• Town Operations &amp; Education Spending</li> <li>• Taxes</li> <li>• Residential and commercial tax base</li> <li>• Property values trends</li> <li>• Other, other, etc.</li> </ul>

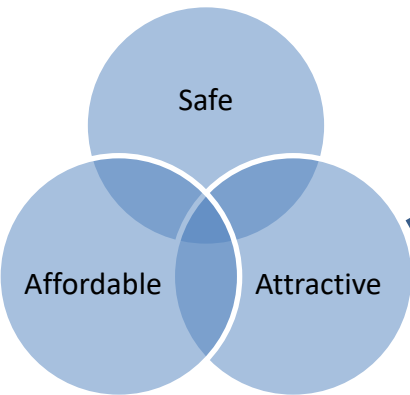
# Strategic Plan Committee

## Considerations Moving Forward

### Today

### Challenges and Opportunities

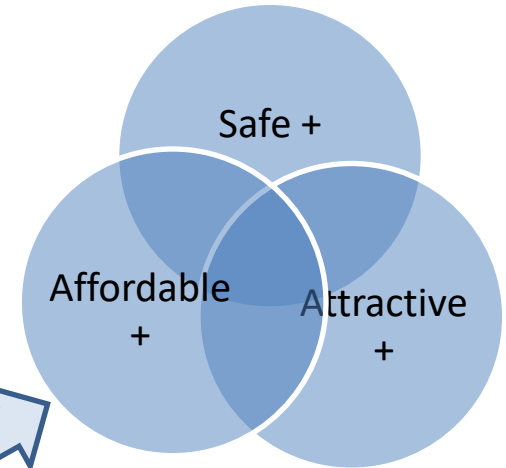
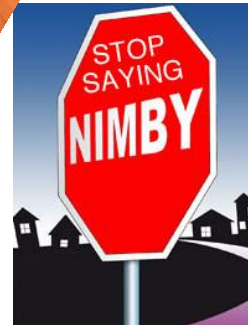
### Destination



Too Much Change

Too Little Change

Wrong Changes



### Objective:

Maintain  
or  
Improve



# Strategic Planning Activities

## An Overview of the Process

### Structure Analysis

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- Etc.



### Gather Stakeholder Input

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Work Underway



Work Underway



Work Underway



# Strategic Plan Update

## Strategic Plan – What Are Examples of Strategic Issues?

### **Example Non-Strategic Issues:**

- There is a pothole at the corner of Main and Elm.
- Dogs off leash at the Open Space are becoming a problem.
- This year's budget adjustments do not make sense.

### **Example Strategic Issues:**

- Commercially zoned properties may be able to leveraged more effectively so that a greater grand list contribution can be achieved (e.g. 5% to 10% of GL tax revenues).
- Antiquated or inconsistent zoning regulations may be impeding beneficial development initiatives.
- Key elements of the Town's attractiveness are being impaired by poor land planning.
- Town assets (e.g. commercial assets, beaches, other) should be better leveraged to support spending needs, maintain affordability, and improve property values.
- Spending is exceeding the ability to be supported by residential taxes.

# Appendices

**The following slides provide supplemental information on the background of the Strategic Plan initiative.**

# Strategic Plan Committee

## SPC Background and Members

- BOS in consultation with other Town Boards determined that a Strategic Plan would benefit the longer term planning needs of the Town, and developed a Strategic Plan Committee (SPC) charge.
- BOS invited residents with an interest and capability to submit their application for consideration and evaluated candidates.
- SPC sworn in and initiated monthly meetings in June 2017.

### **SP Committee Members:**

Marc Andre (3/2018)	Jaclyn Picarillo
Marlene Battista (Secretary)	Stephanie Schechter
Patti Dyer (2/2018)	Justin Thomas
Andrew Graceffa (3/2018)	Kristen Tierney (2/2018)
Jay Gross (Vice Chair)	John Wynne (Chair)
Karen Kaiser	

# Strategic Plan Committee

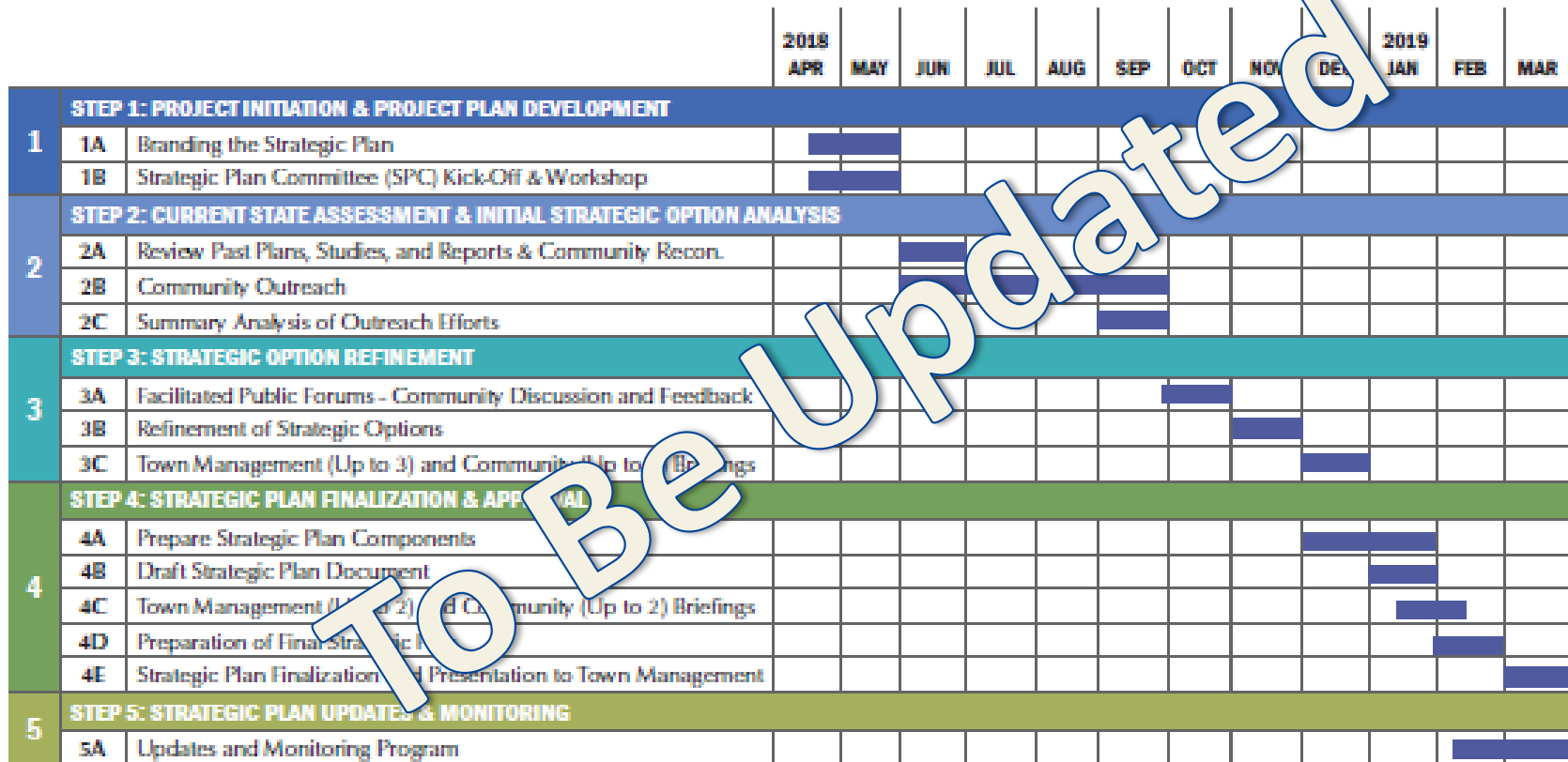
## SPC Charge

- Engage a planning consultant with coordination of Town purchasing. Emphasis will be placed on ensuring community engagement.
- Develop a process for completing the plan, which may include several phases.
- Update BOS quarterly, and other Town Boards as appropriate.
- Leverage identified best practices from other municipalities.
- Utilize approaches to gather Stakeholder input and inform and educate residents as appropriate to ensure community awareness and involvement.
- As appropriate and necessary, add members or establish subcommittees to deepen specific necessary skills or perform analysis in order to ensure development of a comprehensive and thorough plan.

# Strategic Plan Project Timing

Note: Schedule in process of update

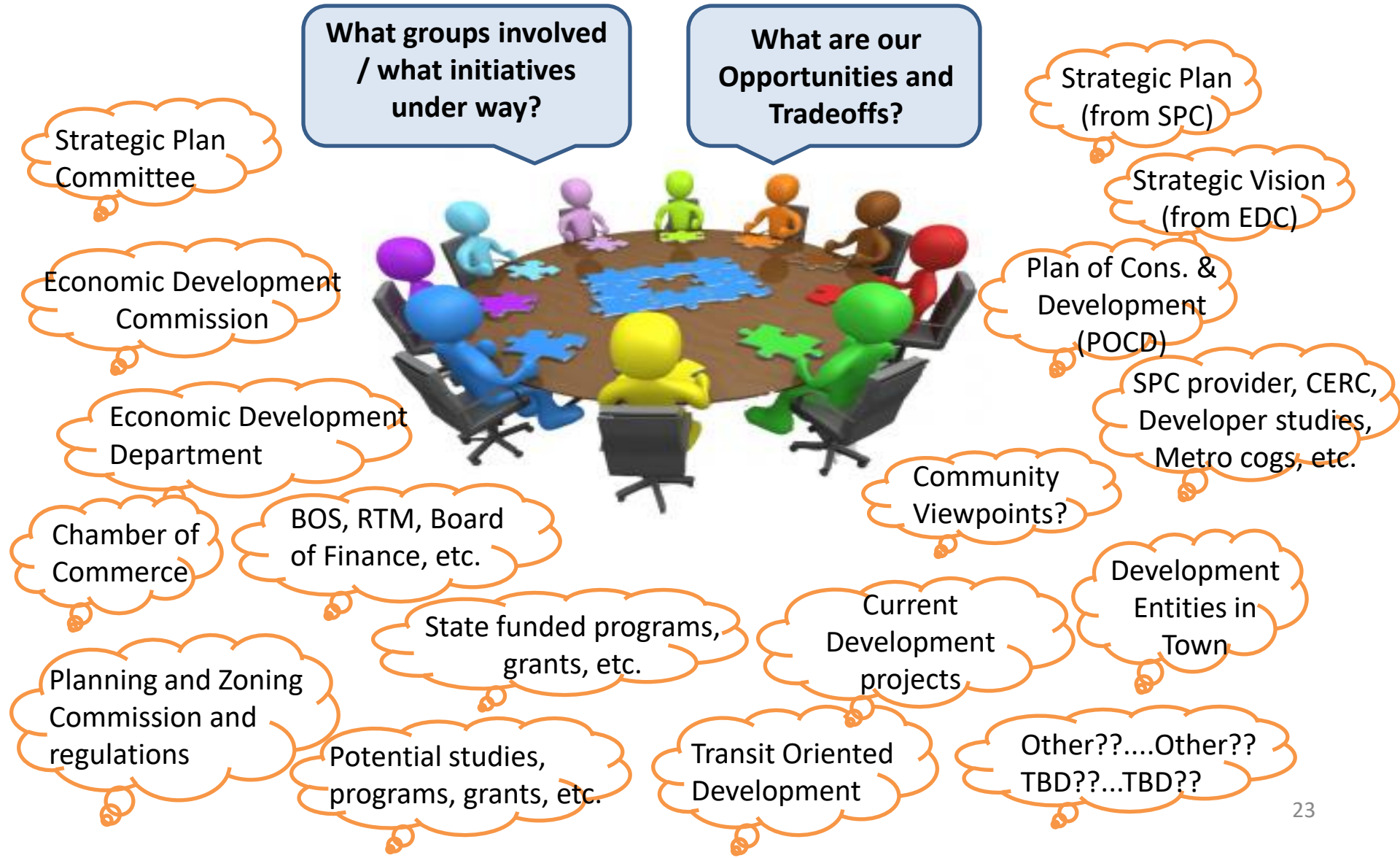
- The draft project plan outlines the time period for each step of the expected work, as well as an indication of the meetings to be conducted and deliverables.
- Project is planned to be conducted over a 10 to 12 month time period.



■ Denotes the estimated timeline for each individual task.

# Coordination - Initiatives and Organizations:

Many initiatives are under way here in Town requiring coordination to achieve the most impactful direction, synergies, and effectiveness of execution



# Idea Evaluation - Potential Changes, Ideas, and Suggestions:

There will be many ideas offered – the focus needs to be on the process by which all ideas are considered on equal footing along with...options and tradeoffs for all

**Are there  
different  
perspectives  
or ideas?**

**Are changes  
needed / What  
changes / How?**



No sacred cows...  
everything on table

Will a Vision for the  
Town be created?

What do we put on hold  
while we develop the  
plan?

Need to look at  
tradeoffs re  
Town assets

Need to ensure we  
use similar Towns as  
Fairfield and outside  
of CT as well

Why have we waited  
so long to do this?

Town services, Education...  
change services, restructure,  
cut costs, raise taxes?

How to react to State  
issues – S/T and L/T?

Should look longer  
term - out 30+ years,  
but be actionable

Plan needs to be  
implementable

Using external  
consultant is good

Why is a consultant  
needed?

What can be done to  
improve/transform  
service delivery?

Other??....Other??  
TBD??...TBD??



# Strategic Plan Committee

## Strategic Planning – A Deeper Dive (1/2)

### **What is Strategic Planning?**

- Strategic planning is used to set priorities, focus energy/resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.
- It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future. Effective strategic planning articulates a) where an organization is going, b) the actions needed to make progress, and c) how it will know if it is successful.

### **What is a Strategic Plan?**

- A strategic plan is a document used to document & communicate the organizations goals, the actions needed to achieve those goals, and other critical elements developed during the planning effort.

### **What is Strategic Management and Execution?**

- Strategic management is the comprehensive collection of ongoing activities and processes that organizations use to coordinate and align resources and actions with mission, vision and strategy throughout an organization.
- Strategic management activities transform the static plan into a system that provides performance feedback to decision makers, and enables the plan to evolve as requirements and other circumstances change during plan execution.

# Strategic Plan Committee

## Strategic Planning – A Deeper Dive (2/2)

### **What Are the Steps in Strategic Planning & Management?**

- There are numerous techniques for strategic planning, management, and execution. Most follow a similar pattern, have common attributes, and typically cycle through a variation on some basic phases:
  - 1) analysis or assessment, where an understanding of the current internal and external environments is developed,
  - 2) strategy formulation, where high-level strategy is developed and a basic organization level strategic plan is documented,
  - 3) strategy execution, where the high-level plan is translated into more operational planning and action items,
  - 4) evaluation or sustainment / management phase, where ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues occurs.

Adapted from: Balanced Scorecard